

## FSA Experimental Sites Initiative Online Annual Reporting Tool User Guide Version 4.0 (September 18, 2005)

The U.S. Department of Education, Federal Student Aid introduced the online annual reporting tool for the Experimental Sites Initiative in December 2003. All participating schools are required to use the online tool to complete and submit their annual reports. This guide will discuss the reporting requirements, and how to use the online reporting tool to report current academic year data and to access prior year reports. The following is a brief Table of Contents:

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### **1.0 Reporting Period**

Participants will use the online reporting tool to complete and submit their annual reports. Your annual report must be submitted by November 15.

### **2.0 Authorized Users**

Each participating school can designate up to three individuals to access and use the online tool. Each user will have the same access rights, with the ability to edit, save, and submit the school's annual report. Only the School Experimental Sites Coordinator can designate/add, or remove authorized users.

## **2.1     *Designating/Adding a User***

To designate or add a user, your school's Experimental Sites Coordinator or other designated user must complete the User Account Request form (see Appendix A for a copy of the form). Ensure that the "School User Account" box is checked for the account type and "Create User Account" is checked for the account action. You must check the acknowledgement box to show that you have read and understand the Experimental Sites Annual Reporting Tool Rules of Behavior. The Experimental Sites Coordinator and user will sign the form and fax it to the Experimental Sites team at 202-275-4537 or 202-275-5864 (Attention: Warren Farr). Use the secondary number only to Designate/Add users. If you try to use the number for any other issue your fax will not be received."

The user will then be registered and issued their User ID. A temporary password will be issued in a separate email message (A confirmation email message will also be sent to your school's Experimental Sites Coordinator notifying them that your account has been created). When the user first logs onto the Experimental Sites Annual Reporting Tool, s/he will be prompted to change the temporary password.

## **2.2     *Removing Users***

To remove a user, your school's Experimental Site Coordinator must complete the User Account Request form (see Appendix A for a copy of the form). Ensure that the "School User Account" box is checked for the account type and "Remove User Account" is checked for the account action. The Experimental Sites Coordinator will sign the form and fax it to the Experimental Sites team at 202-275-4537 (Attention: Warren Farr).

Once the user has been removed from the authorized users database, a confirmation email message will be sent to your school's Experimental Sites Coordinator only.

## **2.3     *Changing Your School's Experimental Site Coordinator***

If your school needs to designate a new Experimental Site Coordinator please contact Warren Farr at 202-377-4380 or [ExperimentalSites@ed.gov](mailto:ExperimentalSites@ed.gov)

## **3.0     *Accessing the Experimental Sites Annual Reporting Tool***

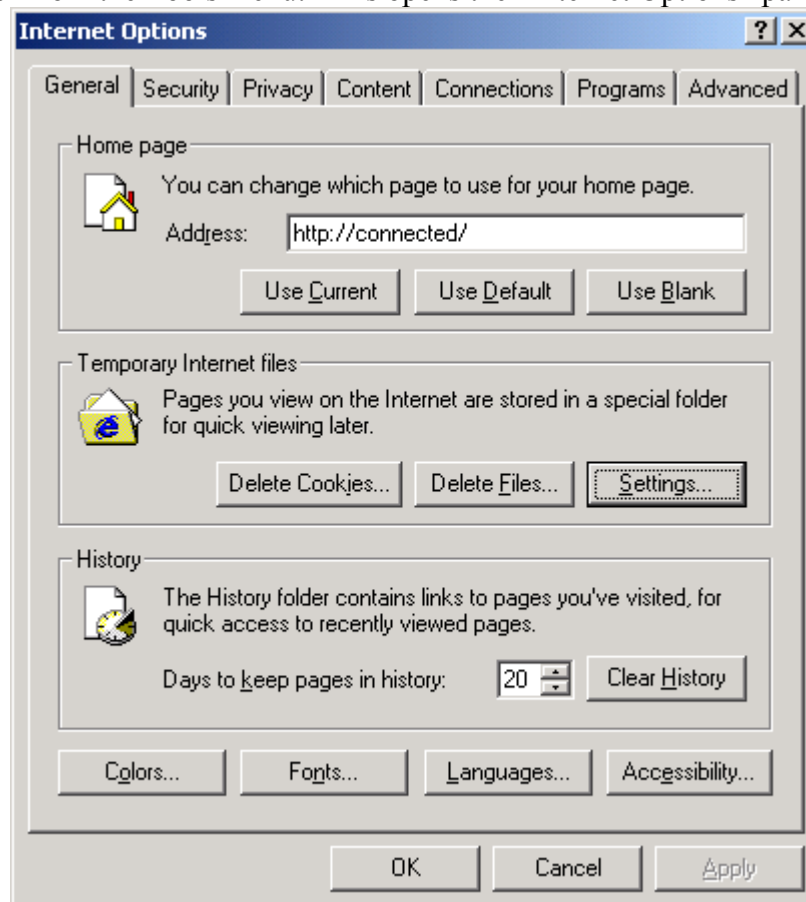
To access and use the online reporting form, you must have a web browser (e.g., Internet Explorer 5.0 or higher). You can access the Experimental Sites Annual Reporting Tool from the Experimental Sites home page at <http://ExperimentalSites.ed.gov>. The "Annual Reporting Tool Log In" link is located under "For Participants" in the tool bar on the left hand side.

## **3.1     *Browser Requirements***

The Experimental Sites Annual Reporting Tool has been tested using Internet Explorer 6.0. It is recommended that you use Internet Explorer when using the Annual Reporting Tool. Visitors

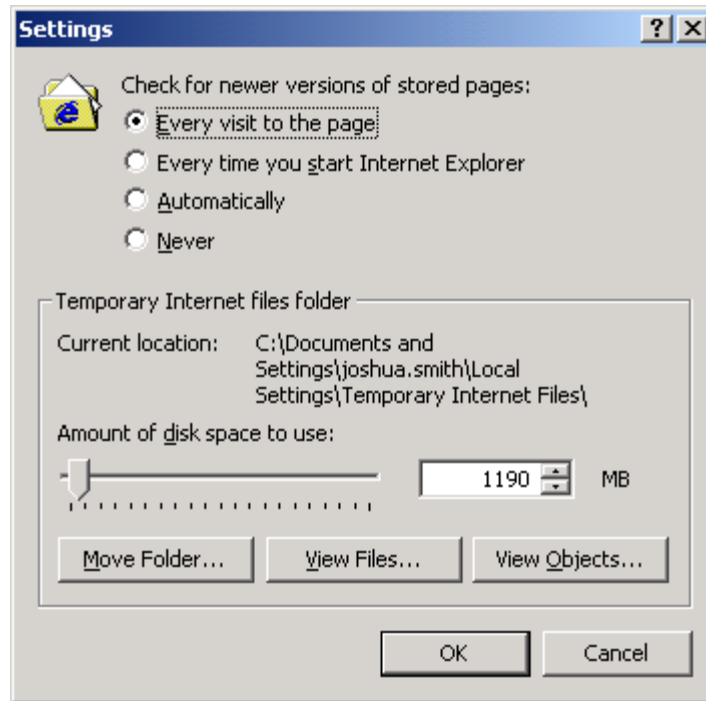
using other browsers may experience problems when using the Annual Reporting Tool. The browser you use must support JavaScript.

It is also highly recommended that you set Internet Explorer to check for newer versions of a stored page on every visit to the page. This can be done by starting Internet Explorer and selecting “Internet Options” from the Tools menu. This opens the “Internet Options” panel. See Figure 1.



**Figure 1 - Internet Explorer's Internet Options panel**

Once the “Internet Options” panel is open, select the “General” tab and then click on the “Settings” button. This opens the “Settings” panel. See Figure 2. Once the “Settings” panel is open, select the “Every visit to the page” option (as shown in Figure 2) and then click the “OK” button. This closes the “Settings” panel. Click the “OK” button on “Internet Options” panel to close the panel.



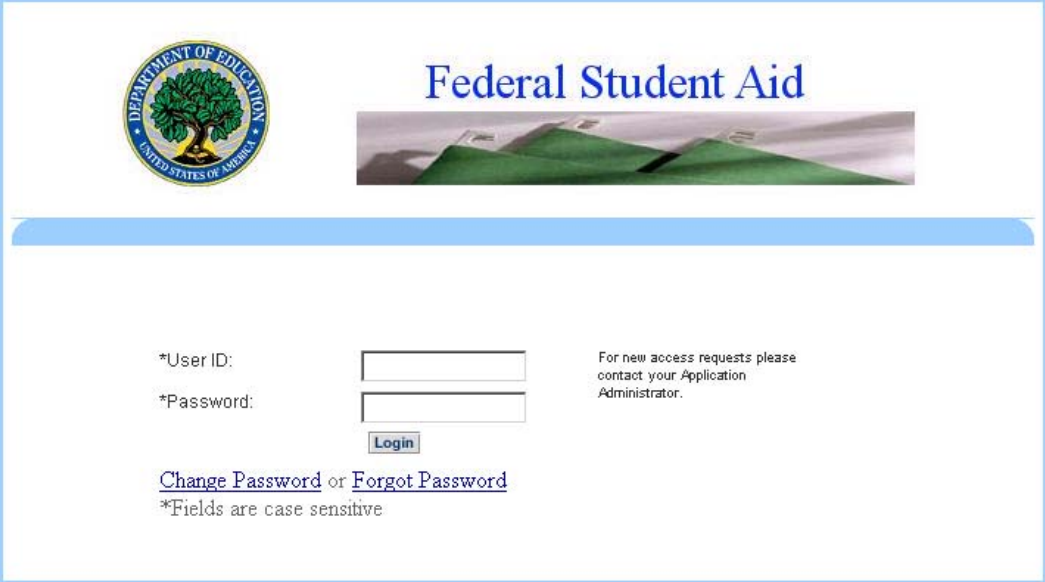
**Figure 2 - Settings panel**

## **4.0 Logging In**

To prevent unauthorized access to the reporting tool, the FSA Login Screen will ask you to enter your user ID and password. See Figure 3. Once you enter your User ID and password, click “Login”. The system will verify that you are a registered user and that you are authorized to access your school’s report.

The FSA Login screen contains a warning message indicating that you are accessing and using a United States Government computer network. By logging in to the application you acknowledge that you have read and understand the warning message.

During your first log in attempt, you will be asked to change your temporary password. After logging in with your user ID and temporary password the Federal Student Aid Change Password Redirect Screen loads. See Figure 4. After ten seconds, or after clicking on the link, the FSA Identity Management screen will load. See Figure 5. During your first log in attempt, you will be asked to set up your account for self-maintenance and to change your password. These tasks are described in sections 4.1 and 4.2 respectively.



The login screen features the Department of Education seal on the left and the title "Federal Student Aid" in blue text on the right, above a banner image of green hills. Below the title is a horizontal blue bar. The login area contains two input fields: "\*User ID:" and "\*Password:". To the right of the password field is a "Login" button. Below the password field are two links: [Change Password](#) and [Forgot Password](#). A note states: "For new access requests please contact your Application Administrator." A disclaimer at the bottom reads: "This is a U.S. Federal Government owned computer system, for the use by authorized users only. Unauthorized access violates U.S. Code Sections 1029 & 1030 and other applicable statutes. Violations are punishable by civil and criminal penalties. Use of this system implies consent to have all activities on this system monitored and recorded, which can be provided as evidence to law enforcement officials."

\*User ID:

\*Password:

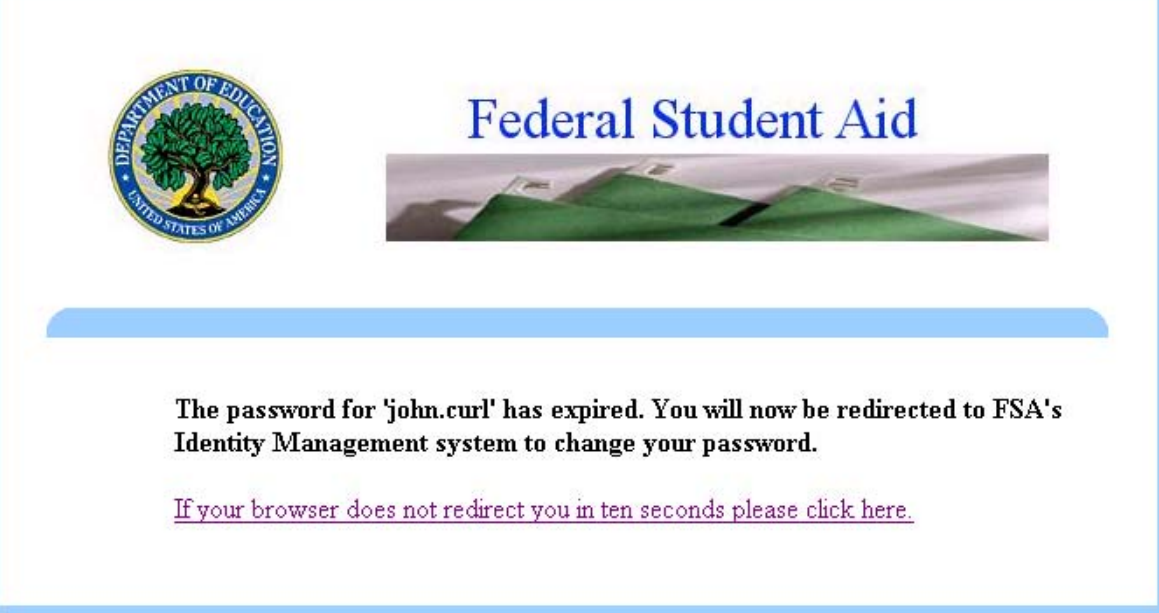
[Change Password](#) or [Forgot Password](#)

\*Fields are case sensitive

For new access requests please contact your Application Administrator.

**This is a U.S. Federal Government owned computer system, for the use by authorized users only. Unauthorized access violates U.S. Code Sections 1029 & 1030 and other applicable statutes. Violations are punishable by civil and criminal penalties. Use of this system implies consent to have all activities on this system monitored and recorded, which can be provided as evidence to law enforcement officials.**

Figure 3 - Federal Student Aid Login Screen



The redirect screen features the Department of Education seal on the left and the title "Federal Student Aid" in blue text on the right, above a banner image of green hills. Below the title is a horizontal blue bar. The main message states: "The password for 'john.curl' has expired. You will now be redirected to FSA's Identity Management system to change your password." Below this is a link: [If your browser does not redirect you in ten seconds please click here.](#)

**The password for 'john.curl' has expired. You will now be redirected to FSA's Identity Management system to change your password.**

[If your browser does not redirect you in ten seconds please click here.](#)

Figure 4 – Federal Student Aid Change Password Redirect Screen

#### 4.1 *Setting Up Your Account for Self-Maintenance*

It is now possible to manually retrieve your password if you forgot it or to reset your password if you have locked your account. These actions can be done online without contacting the Experimental Sites team at [ExperimentalSites@ed.gov](mailto:ExperimentalSites@ed.gov). In order to perform these activities, you must set up your account for self-maintenance. During your first login attempt, you should automatically be taken through this process.

To set up your account for self-maintenance, access the Experimental Sites Annual Reporting Tool as described in Section 3.0. Once on the FSA Login screen, click the “Change Password” link. See Figure 3. Clicking on the “Change Password” link takes you to the FSA Identity Management Login screen. See Figure 5.



DEPARTMENT OF EDUCATION  
UNITED STATES OF AMERICA

## Federal Student Aid

User ID:

Password:

Login

[Enter user name and click here if you forgot your password.](#)

FSA IDENTITY MANAGEMENT

**Figure 5 – FSA Identity Management Login Screen**

Once on the FSA Identity Management Login screen enter your user ID and password and then click on the “Login” button. Clicking on the “Login” button takes you to the Enter Challenge Questions screen. See Figure 6.

The screenshot shows a web interface for entering challenge questions. At the top, a breadcrumb trail reads "You Are Here: Enforce Challenge Response > Challenge Response". Below this, a header bar contains the instruction "Add any 3 challenge(s) to the list to provide response(s) and continue" followed by a help icon (?). The main area features a large empty rectangular box for a list of questions, with "Add" and "Delete" buttons to its right. At the bottom left of the main area are "Continue" and "Reset" buttons. A dark blue footer bar at the very bottom contains the text "FSA IDENTITY MANAGEMENT".

**Figure 6 - Enter Challenge Questions Screen**

Once at the Enter Challenge Questions screen, you need to enter your challenge questions. These questions are used to confirm your identity when you are retrieving your password or unlocking your account. Typical questions include “What is your mother’s maiden name?” and “What was the name of your favorite pet?” The answers to the questions you choose should be easy for you to remember while being difficult for others to guess.

Enter each question into the smaller text box and then click on the add button. The question will move from the smaller text box to the large text box beneath the small text box. This larger text box displays all the challenge questions you have entered. Once you have entered at least 3 challenge questions, click on the “Continue” button. This loads the Enter Challenge Questions Answer screen. See Figure 7.

**You Are Here: Enforce Challenge Response > Challenge Response**

**Please provide response(s) to the challenge(s)** [?](#)

Challenge	Response	Confirm
What is the name of the street your grew up on?	<input type="text"/>	<input type="text"/>
What is the name of your favorite pet?	<input type="text"/>	<input type="text"/>
What is your mother's maiden name?	<input type="text"/>	<input type="text"/>

FSA IDENTITY MANAGEMENT

**Figure 7 – Enter Challenge Questions Answers Screen**

Once at the Challenge Questions Answer screen, enter and confirm the answer to each question entered at the Enter Challenge Questions screen. Once the answers/confirmations have been entered, click on the “Submit” button. This loads the Manage Password screen. See Figure 8. Once at the Manage Password screen, you may change your password as described in the next section or you may click on the “Logout” button in the upper right hand corner. If this is your first time logging in you should change your password as described in Section 4.2.



Rules	Service	Login	Status
	Exp Site Tam Service	john.curl	Active
	FSA ITIM Service	john.curl	Active

Buttons: Submit, Reset

View Combined Password Rules

FSA IDENTITY MANAGEMENT

Figure 8 - Manage Password Screen

## 4.2 Changing Your Password

You can change your password at any time. To change your password, click the “Change Password” link on the FSA Login Screen. See Figure 3. Clicking on the “Change Password” link takes you to the FSA Identity Management screen. See Figure 5. Once on the FSA Identity Management screen enter your user ID and password and then click on the “Login” button. (If this is your first time Logging in at the FSA Login Screen, you will be taken through the steps to set up your account for self-maintenance as described in Section 4.1).

Once at the Manage Password enter your new password and then confirm the new password. Ensure that the checkbox to the right of “Create Password” is unchecked. See Figure 8. To have the password change take place immediately, ensure that the “Schedule Immediately” checkbox is checked. See Figure 8. If you would like the password change to take place on a future date/time, enter the date in the “Effective Date” drop down boxes and uncheck the “Schedule Immediately” checkbox.

Once the new password has been entered and confirmed click on the “Submit” button. A browser message box will open confirming that your password has been changed. See Figure 9.

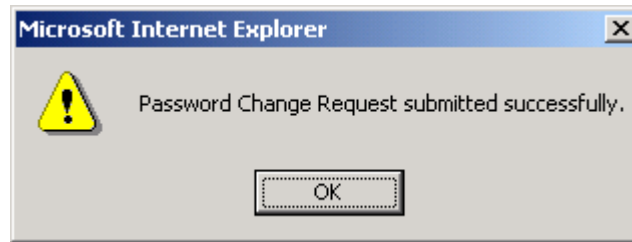


Figure 9 - Password Change Confirmation Box

Click “OK” to return to the Manage Password screen. Your password has successfully been changed. Click on the “Logout” button in the upper right corner to log out of the FSA Identity Management system. This returns you to the FSA Login screen. See Figure 3. Log in using your user ID and your new password. The screen shown in Figure 10 will load. Click the “Access the Experimental Sites Annual Reporting Tool” link to load your school’s report.

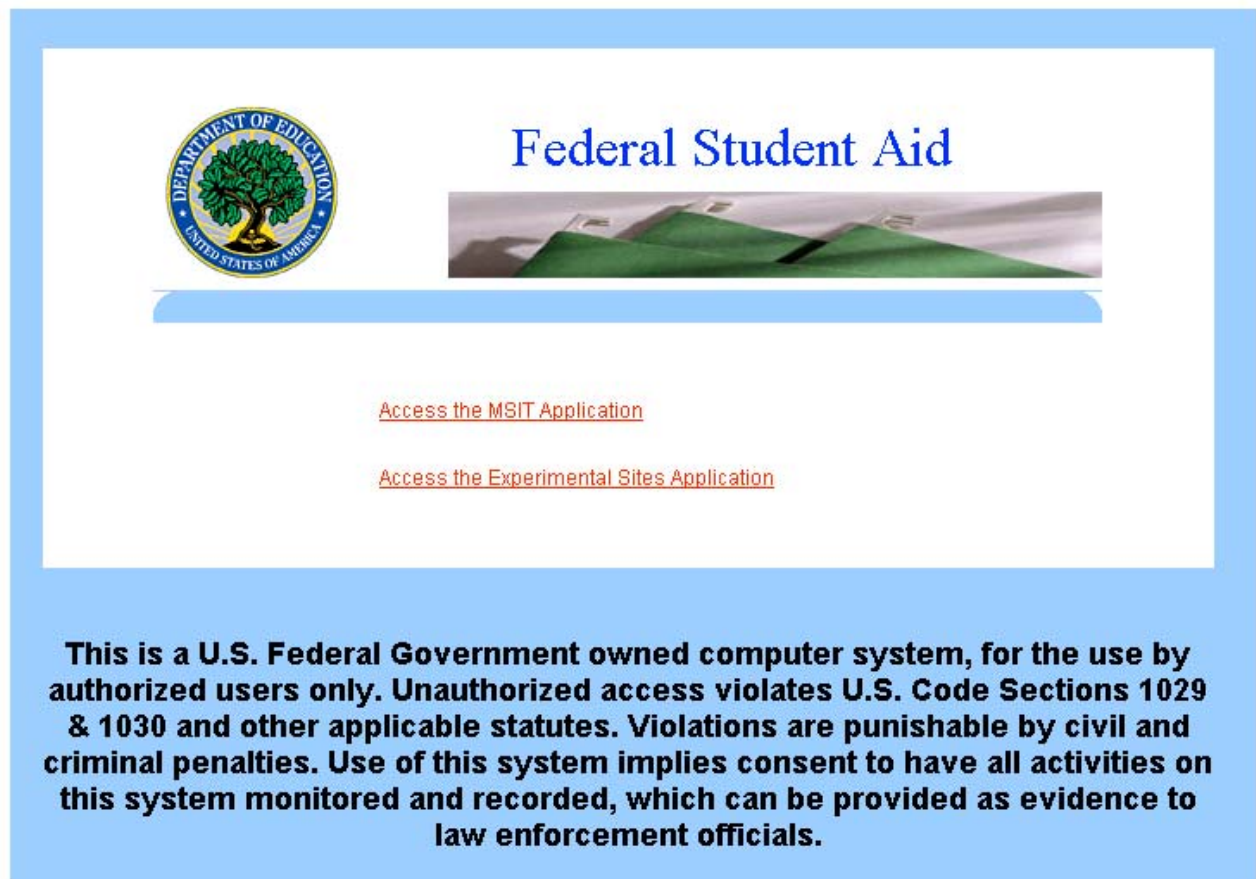


Figure 10 - FSA Application Selection Screen

### 4.3 *Forgot Your User ID or Password*

If you do not remember your User ID, contact Warren Farr at 202-377-4380 or [ExperimentalSites@ed.gov](mailto:ExperimentalSites@ed.gov). You will be provided with your User ID via email or phone.

If you forgot your password, you can retrieve it online. Online retrieval of your password can only happen if you have set up your account for self-maintenance as described in Section 4.1. To retrieve your password online, access the Experimental Sites Annual Reporting Tool as described in Section 3.0. Once at the FSA Login screen, click on the “Forgot Password” link. This loads the FSA Identity Management Forgot Password screen. See Figure 11.

Please enter your User Id.

User ID:

Password:

Login

[Enter user name and click here if you forgot your password.](#)

FSA IDENTITY MANAGEMENT

**Figure 11 - FSA Identity Management Forgot Password Screen**

Once at the FSA Identity Management Forgot Password screen, enter your user ID and click on the link that says “Enter user name and click here if you forgot your password.” This will load the challenge screen. See Figure 12.

Please respond to the challenge(s)

What is the name of the street your grew up on?:

Submit

[Back to login page](#)

FSA IDENTITY MANAGEMENT

**Figure 12 - Challenge Screen**

The challenge screen will randomly present you with one of the challenge questions you entered during the set up of your account for self-management. Enter the answer to the question and click on the “Submit” button. This loads the Change Password screen shown in Figure 13.

**You Are Here: Forgot Password > Change Password**

**Change Password** ?

**New Password**

**Confirm Password**

	Rules	Service	Login	Status
<input checked="" type="checkbox"/>		FSA ITIM Service	new.exp	Active

FSA IDENTITY MANAGEMENT

**Figure 13 - Change Password Screen**

Enter and confirm your new password and then click the “Submit” button. The Manage Password screen will then load. See Figure 8. **If the Manage Password screen loads, your password was changed successfully. You do not need to change your password again.** Click on the “Logout” button in the upper right corner to log out of the FSA Identity Management system. This returns you to the FSA Login screen. Log in using your user ID and your new password. The screen shown in Figure 10 will load. Click the “Access the Experimental Sites Annual Reporting Tool” link to load your school’s report.

If you have not set up your account for self-management as described in section 4.1, you will need to contact Warren Farr at 202-377-4380 or [ExperimentalSites@ed.gov](mailto:ExperimentalSites@ed.gov). You will be provided a new temporary password via email. You will be prompted to change your password after logging in with the temporary password.

#### **4.4 Expiring Passwords**

User passwords will expire every 90 days. When your password expires, you will be prompted to change your password when you attempt to log in. Section 4.2 describes how to change your password.

#### **4.5 Password Lock-Out**

As a system security feature, the online reporting tool log in screen will allow only 4 failed log in attempts before the system automatically locks-out your password. If you lock-out your account a screen will load that says “HPDIA0306W This account has been temporarily locked out due to too many failed login attempts.”

To unlock your account and regain access you will need to close your current browser window, open a new window and return to the FSA Login screen. See Figure 3. Once at the FSA Login Screen change your password as described in Section 4.2. If you are unable to unlock your account, contact Warren Farr at 202-377-4380 or [ExperimentalSites@ed.gov](mailto:ExperimentalSites@ed.gov). You will be provided a new temporary password via email. You will be prompted to change your password after logging in with the temporary password.

## **5.0 Annual Report Home Page**

After logging in, the online reporting tool will take you to the Annual Report Home Page. The Home Page lists your school name, the academic year for which you are reporting, and some information on using the site. The Home Page's "Experimental Sites Worksheets Required" section lists the specific experiments in which your school is participating for the current year. This section can also be used to track your progress in completing your annual report. As each worksheet is completed, a checkmark will appear beside the experiment. Once you have completed all of the worksheets, you can then submit your final annual report (see Section 10.0 for additional details on submitting the report). In addition, the site contains a drop-down menu where you can access your prior academic year reports (see Section 12.0 for additional details on this feature).

## **6.0 Accessing Worksheets**

It's important to complete the Demographics worksheet first since the system must check some of the other worksheet data against this form. After completing the Demographics worksheet, you may complete your remaining worksheets in any sequence you prefer. The "Go to Worksheet" box at the bottom of every page lets you "jump" directly to any worksheet. To access a worksheet, click on one of the experiments in the "Go To Worksheet" box's drop down menu and then click "Go". You can also access a worksheet by clicking on the worksheet's name in the "Experimental Sites Worksheets Required" section of the Annual Report Home Page.

## **7.0 Entering Worksheet Data**

Once you open a worksheet page, your cursor will automatically appear in the first data entry field. You can go to a particular field by either using your mouse to click on a data field or by using the "Tab" key. You are not required to enter all of your worksheet data at one time. You can enter some data, save the worksheet, and then return to the worksheet at a later time (see Section 9.0 for additional details on saving a worksheet).

When completing the worksheets, there are several data elements that have specific range, sum, and/or cross-edit check requirements. The Data Dictionary lists each of these requirements where applicable. Please make sure to refer to the Data Dictionary as you are completing the worksheets (see Section 14.0 for additional details on accessing the Data Dictionary). Also, when you save your worksheet, the online reporting tool will automatically check your entered data to make sure it does not violate any range, sum, and/or cross-edit check requirements (e.g., number in field 1 cannot be greater than number in field 2). If there is an error, you will be returned to the

worksheet and a red error message will be provided at the top of the worksheet. The error message will state ERROR and then provide a description of the error.

Lastly, almost all of the worksheets have comment boxes that must be completed before you can submit your report. When you open a worksheet, the system will automatically check to see if the worksheet's comment boxes are completed. If a comment box is not completed, the system will display a red notification message stating "[not entered]" above the comment button. You can save your worksheet data without entering data in the comment box. However, you will not be able to submit your report until all required comment boxes are completed. Once you enter comments in a comment box, the notification message will disappear.

## **8.0 Timeouts**

The Experimental Sites online reporting tool will "timeout" your session if there has been no activity for 30 minutes. Inactivity means that the server has not been accessed for 30 minutes (i.e., you may have been typing in a worksheet, but if you have not saved or opened a new worksheet during the 30 minutes, you will be timed-out). Please note that if you are timed-out, you will lose any changes that were made since you last saved. For your security, we must ask you to log in again." Simply log in by entering your User ID and password.

## **9.0 Saving Worksheet Data**

The Experimental Sites online reporting tool gives you the freedom to enter, save, and edit your worksheets at your convenience. In other words, you do not have to complete all your data entry in a single session. To save a worksheet, click the "Save Data" button located near the bottom of the worksheet. The system will then check (1) the formats of some of the data elements (e.g., make sure there is no text in a number field) and (2) make sure the data elements do not violate any range, sum, and/or cross edit check requirements (e.g., number in field 1 cannot be greater than number in field 2). Some data elements in the experiment worksheets cannot be greater than data entered into the Demographic worksheet. When you save the worksheet, the system will also check for any of these data entry errors. If there is an error, you will be returned to the worksheet and a red error message will be provided at the top of the worksheet. The error message will state ERROR and then provide a description of the error. If you attempt to go to a new worksheet without correcting the errors, the system will notify you that you will lose your entered data and ask you if you would like to continue.

If there are no formatting or cross edit check errors within the worksheet, you will be returned to the worksheet and a red message will be provided at the top of the worksheet stating "Your data has been saved". You can then continue your data entry. You can also exit the reporting tool, return to the reporting tool Home Page by clicking the "Annual Report Home" button in the main tool bar, or use the "Go to Worksheet" navigation box to select a new experiment.

When you save your worksheet, the system will also check to see if all required fields have been completed (this includes any required text boxes). If so, a checkmark will be displayed next to the worksheet's name on the reporting tool Home Page. This can serve as a useful reference for determining the status of your completed worksheets. **IMPORTANT NOTE:** If a check mark

does not appear next to one of your worksheets, make sure you completed all required fields and text boxes. If a required text box has not been completed, the system will display a red notification message stating “[not entered]” above the comment button.

You can return to a saved worksheet at any time by selecting the worksheet in the “Go to Worksheet” navigation box and clicking “Go”. When the system opens the worksheet, it will automatically retrieve your saved data.

If you attempt to go to a new worksheet without saving your current worksheet, the system will prompt you to save the worksheet. **IMPORTANT NOTE:** If you close your web browser or click your web browser’s “Back” button without saving your current worksheet, you will lose any unsaved data.

## **10.0 Submitting Your Completed Report**

Once you have completed all of your school’s worksheets, you can then submit your school’s annual report to the Department of Education. The reporting tool Home Page will also display checkmarks next to those worksheets that have been completed (i.e., all of the worksheets’ required fields have been completed). You can use the Home Page to verify that all of your worksheets are complete before submitting your annual report.

To submit your annual report, return to the reporting tool Home Page and click the “Submit Report” button. The reporting tool will verify that all required fields have been completed. If there are any incomplete fields, you will be provided with a dialog box stating that your report could not be submitted because a worksheet(s) was not complete. The dialog box will also refer you to the list of worksheets on the reporting tool Home Page. Those worksheets that do not have a checkmark after their name are not complete (i.e., have some missing data).

After verifying that all of your worksheets are completed, the reporting tool will also run a final check to make sure the data elements do not violate any range, sum, and/or cross edit check requirements (e.g., number in field 1 cannot be greater than number in field 2). If there are any remaining data entry errors, the tool will return you to the Home Page and a red error message will be provided at the top of the worksheet. The error message will state “ERROR: The following data entry errors have been identified and must be corrected before your report can be submitted.” The error message will also provide a list of the worksheets with the data entry errors so that they can be corrected.

Once the system verifies that all of your worksheets were completed and that there are no data entry errors, then your report will be submitted to the Department of Education. The reporting tool will provide you with an immediate confirmation that your report was submitted. You will be able to print this confirmation page for your records.

**IMPORTANT NOTE:** Once your report is submitted, you will NOT be able to make any additional changes, or edit the report or the worksheets. As a result, it is important that you make sure that all data elements are final before you submit your report. You will be able to print your annual report and individual worksheets after the report is submitted (see Section 11.0 for

additional details on printing). If you determine that you need to make additional changes to your submitted report, contact Warren Farr at 202-377-4380 or [ExperimentalSites@ed.gov](mailto:ExperimentalSites@ed.gov). The Experimental Sites team will then unlock your submitted report, so that you can make any final changes.

## **11.0 Printing Your Worksheets and Annual Report**

You can print your worksheets by experiment or your entire annual report at any time. To print an individual worksheet, open the worksheet by using the “Go To Worksheet” navigation box or by clicking on the worksheet’s name in the Annual Report Home Page and then click the “Printer Friendly Version” button. You will then be presented with a printer-friendly view of your worksheet. To print the worksheet, click “Print”. Once the worksheet is printed, click the “Return” button to return to the data entry form.

Once you submit your annual report, you will still be able to print an individual worksheet. When you open a worksheet using the “Go to Worksheet” navigation box or by clicking on the worksheet’s name in the Annual Report Home Page, you will be automatically taken to the printer-friendly view of the worksheet. To print the worksheet, click “Print”. Once the worksheet is printed, click the “Return” button to return to the reporting tool Home Page.

To print your entire annual report, go to the reporting tool Home Page and click the “Printer Friendly Version” button. You will then be presented with a printer-friendly view of all of your worksheets. To print the report, click “Print”. Once the report is printed, click the “Return” button to return to the Home Page.

## **12.0 Accessing Prior Academic Year Worksheets/Reports**

From the Annual Report Home Page, you can access your prior year worksheets and report. Underneath your school’s name, you will see a drop-down menu called “Reporting Year”. To view your prior academic year data, select a particular year from the drop-down menu. The screen will then change to the academic year that you selected and will list your school’s experiments for that year. Please note that you will only be able to view and print your prior year worksheets and report (this reminder will appear at the top of your screen).

To print an individual worksheet, open the worksheet by using the “Go To Worksheet” navigation box or by clicking on the worksheet’s name in the Annual Report Home Page. You will be automatically taken to the printer-friendly view of the worksheet. To print the worksheet, click “Print”. Once the worksheet is printed, click the “Return” button to return to the reporting tool Home Page.

To print your entire annual report, go to the reporting tool Home Page and click the “Printer Friendly Version” button. You will then be presented with a printer-friendly view of all of your worksheets. To print the report, click “Print”. Once the report is printed, click the “Return” button to return to the Home Page. If you’d like to access the Data Dictionary for the academic year you selected, click on the Data Dictionary link at the top of the page.



To return to the current academic year report, select the current year from the “Reporting Year” drop-down menu.

### **13.0 Logging Off / Exiting the Reporting Tool**

You can exit the Experimental Sites Annual Reporting Tool at any time by clicking “Exit” in the main tool bar. You will then exit the tool and be sent to the Experimental Sites home page. You can then close your browser or navigate to another site.

If you return to the Experimental Sites Annual Reporting Tool within 30 minutes of leaving during the same browser session (i.e. you do not close your browser window and open a new window) you will be able to directly access the Experimental Sites Annual Reporting Tool without logging in again. Closing your browser window after exiting will fully log you off.

### **14.0 Data Dictionary**

Two Data Dictionaries have been developed for the Experimental Sites annual report. The Data Dictionaries provide detailed descriptions of each worksheet’s data elements and tips on how to complete each item, including any specific range, sum, and/or cross edit check requirements. The first Data Dictionary includes information on the Demographics worksheet and the following nine experiments:

- Loan Proration
- Overaward Tolerance
- Loan fees in Cost of Attendance
- Credit of Title IV aid to Institutional Charges
- Credit Title IV Aid to Prior Term Charges
- Multiple Disbursements for Single Term Loans
- Thirty Day Delay for First Time First year Borrowers
- Entrance Loan Counseling
- Exit Loan Counseling.

The second Data Dictionary includes information on the Demographics worksheet and the Ability to Benefit experiment.

The Data Dictionary can be accessed from the main tool bar by clicking “Data Dictionary”. Depending on whether or not your school participates in the Ability to Benefit experiment, the system will retrieve the appropriate Data Dictionary for your school (remember that if you are accessing prior academic year data and click on the Data Dictionary link, you will be provided with that year’s Data Dictionary). The Data Dictionary will be an Adobe PDF file. If you do not have Adobe Acrobat, a link to the Adobe home page where you can download a reader is also provided in the main tool bar. Once you open the Data Dictionary, you can print it by clicking “File” and then “Print” in the Adobe main tool bar.

## **15.0 User Guide**

This User Guide can be accessed from the main tool bar by clicking “User Guide”. The User Guide will be an Adobe PDF file. If you do not have Adobe Acrobat, a link to the Adobe home page where you can download a reader is also provided in the main tool bar. Once you open the User Guide, you can print it by clicking “File” and then “Print” in the Adobe main tool bar.

## **16.0 Help**

The Help function provides you with contact information for assistance/questions in completing your annual report. To access the Help function, click the “Help” button on the main tool bar.

## **17.0 Feedback**

The Feedback function gives you an opportunity to let us know what you think about using the online reporting tool and if there are any ways that we can improve our service. To access the Feedback function, click the “Feedback” button on the main tool bar. You will then be provided with a link to the Experimental Sites email address – [ExperimentalSites@ed.gov](mailto:ExperimentalSites@ed.gov) – where you can send feedback.

## **18.0 Privacy**

The Privacy function provides you with a link to information on the Department of Education, Federal Student Aid’s privacy policies. To access the privacy note, click the “Privacy” button on the main tool bar.

## **19.0 Questions/Contacts**

If you have any questions on completing your annual report or on using the online reporting tool, please contact Warren Farr at 202-377-4380 or [ExperimentalSites@ed.gov](mailto:ExperimentalSites@ed.gov).

**APENDIX A.**  
**U.S. Department of Education – Federal Student Aid**  
**Experimental Sites Annual Reporting Tool**  
**User Account Request**

# U.S. Department of Education - Federal Student Aid

## Experimental Sites Annual Reporting Tool

### User Account Request

The following information is required to create, change or remove user accounts. Changes include the designation of a new School Coordinator. The current School Coordinator must sign and fax the completed form to 202-275-4537 to the attention of Warren Farr.

User Information		
<b>Account Type:</b>	<input type="checkbox"/> School User Account	<input type="checkbox"/> School Coordinator
<b>Account Action:</b>	<input type="checkbox"/> Create User Account <input type="checkbox"/> Remove User Account	<input type="checkbox"/> Reauthorize User Account <input type="checkbox"/> Change School Coordinator
<b>Name:</b>		
<b>Title:</b>		
<b>Institution:</b>		
<b>OPE ID:</b>		
<b>Phone:</b>		
<b>Fax:</b>		
<b>Email:</b>		
<b>School Coordinator Name:</b>		
<b>School Coordinator Email:</b>		

Experimental Sites Annual Reporting Tool Rules of Behavior
<p>As a <b>School User</b> of the Experimental Sites Annual Reporting Tool (Experimental Sites), I agree to:</p> <ul style="list-style-type: none"> <li>▪ Follow all operational instructions provided in the Experimental Sites User Guide;</li> <li>▪ Never share my Experimental Sites user ID and/or password with anyone else under any circumstance;</li> <li>▪ Either log off Experimental Sites or lock my workstation if I am logged into Experimental Sites and must leave my workstation;</li> <li>▪ When finished using Experimental Sites, I will log off from the application;</li> <li>▪ Inform the Experimental Sites Application Administrator in the event of any suspected or actual unauthorized use of Experimental Sites</li> </ul> <p>As a <b>School Coordinator</b> for a school participating in the Experimental Sites Initiative, I agree to:</p> <ul style="list-style-type: none"> <li>▪ Inform the Experimental Sites Application Administrator of any user changes (i.e. adding or removing Authorized School Users), including a change in School Coordinator;</li> <li>▪ Inform the Experimental Sites Application Administrator in the event of any suspected or actual unauthorized use of Experimental Sites</li> </ul> <p>I understand that failure to abide by these rules of behavior may result in losing access to Experimental Sites.</p>
<input type="checkbox"/> I hereby acknowledge that I understand and agree to the Experimental Sites Rules of Behavior

\_\_\_\_\_  
User's Signature and Date

\_\_\_\_\_  
School Coordinator's Signature and Date

**NOTE:** Users will be notified of completed requests through email. New users must change their password upon first logging into the Experimental Sites Annual Reporting Tool.

For Experimental Sites Team Use Only			
<b>Date Received:</b>		<b>Access Issued:</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No <b>Date:</b> <span style="border: 1px solid black; display: inline-block; width: 100px; height: 1.2em; vertical-align: middle;"></span>
<b>System Security Officer Signature:</b>			